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## Introduction

As a SBIR grant recipient in order to process payment requests and view grant financial information with NSF, you must be assigned a Financial Functions User (FFU) role through FastLane. FFU roles are assigned by your organization's Financial Administrator. Once you are an FFU, you can use the Award Cash Management Service (ACM\$) to:

1. Request Payments for NSF awards.
2. View award and organization payment history and financial information.

## How to Become a Financial Function User (FFU)

Becoming a FFU; this involves two steps:

1. The **Authorized Organizational Representative (AOR)** in your organization—with permissions to add, modify, and delete users and to initialize/change passwords—gives an individual in your organization the **Financial Administrator** permission. The Financial Administrator is usually a member of your organization's Finance Office, such as the Controller or Deputy Controller. (If necessary, the SPO can also be the Financial Administrator.)
2. The **Financial Administrator** gives permissions to one or more of your organization's authorized FastLane users to perform financial functions. An individual performing these functions is an **FFU**. (If necessary, the Financial Administrator can also be an FFU).

FFU Roles:

1. The **ACM\$ Awardee Preparer** is the financial/administrative person that initially prepares the payment transaction request in ACM\$. The Awardee Preparer forwards the payment transaction request to a Certifier for certification and submission to NSF. The Preparer also has the capability to complete award and transaction searches and view the payment transaction history.
2. The **ACM\$ Awardee Certifier** is the approving official for the payment transaction request. This person normally holds a management/supervisory role and has the organizational authority to approve payments and/or expenses. For smaller organizations with limited staff sizes the Certifier can also be the ACMS Preparer. The



Certifier also has the capability to complete award and transaction searches and view the payment transaction history.

3. The **ACM\$ Awardee Financial Representative** is the organizational staff member that has view only access to ACM\$, this person cannot prepare or certify cash request transactions. The Financial Representative has the capability to complete award and transaction searches and view the payment transaction history.

The table below summarizes the roles of the FastLane Contact, the Financial Administrator, and the FFU.

Who	Where to Log On	Role
<b>Authorized Organizational Representative:</b> the person in your organization who has all FastLane Research Administration permissions.	FastLane Research Administration	<ul style="list-style-type: none"><li>• Add, modify &amp; delete</li><li>• Designates the Financial Administrator- can designate self as Financial Administrator, if necessary.</li><li>• Authorizes individuals as FastLane users to whom the Financial Administrator can assign permissions for financial functions.</li><li>• Set and reset passwords.</li><li>• Withdraw authorization from the Financial Administrator.</li></ul>
<b>Financial Administrator:</b> individual in your organization, usually from the Finance or Business Office, such as, the Controller or Deputy Controller	FastLane Research Administration	<ul style="list-style-type: none"><li>• Assigns financial function permissions to one or more individuals.</li><li>• Withdraws permissions to perform financial functions.</li><li>• Grants permissions to perform financial functions to self.</li><li>• <i>Cannot reset passwords</i></li></ul>
<b>Financial Functions User:</b> one or more individuals who have permission to carry out one or more financial functions	Research.gov	<ul style="list-style-type: none"><li>• Can perform financial functions as authorized by Financial Administrator:<ul style="list-style-type: none"><li>○ ACM\$ Awardee Preparer</li><li>○ ACM\$ Awardee Certifier</li></ul></li></ul>

## Assigning the Financial Administrator Role

The Authorized Organizational Representative (AOR) designates a Financial Administrator by giving an individual the Financial Administrator permission in the Accounts Management



application of Research Administration. The AOR can do this in two ways: **1. Add a new User,** and **2. Modify a User Profile.**

## Add New User

Go to *Research.gov* and click on the **Research Administration** link at the bottom of the screen as shown below:

The screenshot shows the Research.gov website interface. At the top, there is a header with the NSF logo, the text "Research.gov ONLINE GRANTS MANAGEMENT FOR THE NSF COMMUNITY", and navigation links: "Log In | Home | Contact | Help | About". A search bar is also present. Below the header, a yellow banner contains a "Take Note" message about award data. A blue banner below that says "Hide all notifications (Viewing 1 of 1 notification)". The main content area features a large banner with the text "Can't remember your NSF password?" and a "Learn More/Register" button. Below this, there are four main sections: "Prepare & Submit Proposals", "Proposal/Panel Review", "Awards & Reporting", and "Fellowships & Honorary Awards". Each section contains a list of links and a "FASTLANE" button. At the bottom, there are three sections: "Administration", "Manage Financials", and "NSF Award Highlights". The "Administration" section includes a link to "Research Administration", which is highlighted with a red arrow.

Research.gov  
ONLINE GRANTS MANAGEMENT  
FOR THE NSF COMMUNITY

Log In | Home | Contact | Help | About

Search

Take Note: As of Friday, November 20th, award data within Research Spending & Results may be out of date. We are working to resolve this issue and apologize for the inconvenience.

Hide all notifications (Viewing 1 of 1 notification)

Can't remember your NSF password?  
Find out how you can use your university password to log in to Research.gov.  
[Learn More/Register](#)

**Prepare & Submit Proposals**  
Prepare, submit and check status of proposals  
[Check Proposal Status](#)  
FASTLANE PROPOSAL FUNCTIONS  
[Additional proposal functions](#)

**Proposal/Panel Review**  
Review proposals, participate in panels  
FASTLANE PROPOSAL REVIEW  
[Proposal Review](#)  
FASTLANE PANEL REVIEW  
[Panelist Functions](#)

**Awards & Reporting**  
Submit project reports, notifications & requests  
[Project Reports](#)  
[Deposit Public Access Publication](#)  
[Example Project Reports \(Demo site\)](#)  
[Notifications & Requests](#)  
FASTLANE AWARD FUNCTIONS  
[Additional award functions](#)

**Fellowships & Honorary Awards**  
Nominate colleagues, apply for awards  
[Graduate Research Fellowship Program \(GRFP\)](#)  
[Postdoctoral Fellowships and Other Programs](#)  
[Honorary Awards](#)

**Administration**  
Manage your account and user roles  
[User Management](#)  
FASTLANE ORGANIZATION MANAGEMENT  
[Research Administration](#)

**Manage Financials**  
View balances and submit cash requests  
[Submit or manage payment transactions](#)  
[More about ACMS](#)  
[Program Income Reporting](#)

NSF Award Highlights  
[Explore Scholarly publications in the NSF Public Access Repository \(NSF-PAR\)](#)  
[Search awards going back to 1994](#)



1. On the **Research Administration** screen, log in, then click on **Accounts Management**. The **Accounts Management** screen will display the **User Account** tab by default.



FastLane is an interactive real-time system used to conduct NSF business over the Internet. FastLane is for official NSF use only. [More About FastLane...](#)

[NSF Home](#) | [News](#) | [Site Map](#) | [FastLane Help](#) | [Grants.gov Help](#) | [Contact Us](#)

**FastLane  
User  
Support**

(7 AM to 9 PM Eastern Time • M-F)  
**1-800-673-6188**  
FastLane Availability (recording):  
**1-800-437-7408**

[Proposals, Awards and Status](#) | [Proposal Review](#) | [Panelist Functions](#) | [Research Administration](#) | [Financial Functions](#)

[Honorary Awards](#) | [Graduate Research Fellowship Program](#) | [Postdoctoral Fellowships and Other Programs](#)

#### Quick Links

- ▶ [Instructions for Research Administration](#)
- ▶ [New Organization Registration](#)
- ▶ [EDI Proposal Preparation](#)
- ▶ [Use of NSF ID](#)
- ▶ [FastLane Proposal Preparation and Submission Guide](#)  
(7.1MB PDF)
- ▶ [Grant Proposal Guide](#)

#### Research Administration

Login for the following permission based functions:

- ▶ [Accounts Management](#)
- ▶ [Letters of Intent](#)
- ▶ [Proposals/Supplements/File Updates/Withdrawals](#)
- ▶ [Award Documents](#)
- ▶ [Forwarded/Submitted Revised Budgets](#)
- ▶ [Notifications & Requests](#)
- ▶ [Organizational Reports](#)
- ▶ [Project Reports](#)
- ▶ [Authorized Organizational Representative Functions](#)

#### Log In

Last Name:   
NSF ID:   
[Privacy Act](#)  
Password:

Select one:

- ☒ Research Administration
- ☐ Submit EDI Proposals

[Log In](#)

[Forgot Password?](#)  
[Lookup NSF ID](#)

As a security measure, your FastLane session will expire after remaining idle for 180 minutes.

Download [Adobe Acrobat Reader](#) for viewing PDF files

#### National Science Foundation

4201 Wilson Boulevard, Arlington, Virginia 22230, USA  
Tel: 703-292-5111, FIRS: 800-877-8339 | TDD: 703-292-5090

[Privacy and Security](#)



Organization: NSF

## Research Administration

Select a Research Administration function for NSF :

- ▶ **Accounts Management**
- ▶ Letters of Intent
- ▶ Proposals/Supplements/File Updates/Withdrawals
- ▶ Award Documents
- ▶ Forwarded/Submitted Revised Budgets
- ▶ Notifications & Requests - Disabled in FastLane. Log in to Research.gov
- ▶ Organizational Reports
- ▶ Project Reports - Disabled in FastLane. Log in to Research.gov
- ▶ Authorized Organizational Representative Functions

### In Box

	Proposals/Supplements/File Updates/Withdrawals	89	items for review
	Forwarded/Submitted Revised Budgets	1	items for review
	AOR Functions	0	items for review
	Letters of Intent	0	items for review

**New In Box**  
Now you can easily review current work in progress directly from this page.  
Click below to select current items for review.

2. Click the **Add New User** button and the *Add New User* screen will display.

Research Administration | HOME ▶

NSF Home | News | Site Map | GPG | AAG | Contact Us | FastLane Help  
Change Password | Logout

Organization: NSF

Accounts Management | MAIN ▶

User Account | Organization Information | Financial Representative Information

[View Organization Permissions Report ▶](#)

Search for existing User to view/modify data:

Last Name:

### Search Results

Click on User Name to view/modify/delete data. Sort results by clicking column title.

No users found.

Name	Email Address	Actions
Nothing found to display		

Export options: [Excel](#)

3. In the *User Profile* section, leave the *NSF ID* box blank. NSF will generate an NSF ID for the new user. The following fields must be completed:

- First Name box (user's first name)



- Last Name box (user's last name)
- Email box (user's email)
- Phone Number box (user's direct line-optional entry)
- Fax Number box (user's fax number-optional entry)

In the *Create a Password* box, create and confirm a password for the new user:

Note: If the new user is a **Principal Investigator (PI)**, complete the *Principal Investigator (PI) Profile* section and click the **Add user as PI** check mark box.

- Type any suffix for the user (PI)
  - Specify a department from the *Department* drop-down list (optional entry)
  - Specify a degree type from the *Degree* drop-down list
    - Select appropriate degree year
4. Click the *check mark* box for Financial Administrator within the *User Permissions* section.
  5. Click the **Add User** button – the *View Add User Profile* screen will display showing all profile information and permissions of the new user.



## User Profile screen

**Add New User** **Organization ID: 000000000**

Enter the user's NSF ID if known. Leave the field blank for the system to generate a new NSF ID.  
*Required fields are preceded by an asterisk (\*)*

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**User Profile**

NSF ID: <input type="text"/>	<a href="#">Privacy Act</a>
*First Name: <input type="text" value="Jane"/>	MI: <input type="text" value="A"/>
*Last Name: <input type="text" value="Aliase"/>	
*Email: <input type="text" value="jaliase@nsf.gov"/>	
Phone Number: <input type="text" value="7035551000"/> 10 digits only	<div><b>Create Password:</b> *Create Password: <input type="password" value="*****"/> *Confirm Password: <input type="password" value="*****"/></div>
Fax Number: <input type="text" value="7035550000"/> 10 digits only	

[Password Requirements](#)

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**Principal Investigator (PI) Profile**

☐ Add User as PI

Suffix:  (Jr., Sr., III, Etc)

Department:

\*Degree Type:  ▼

\*Degree Year:  ▼

ORGANIZATION NAME:  
**Carnegie-Mellon University**

(Once added to the NSF PI profile, the PI can change his/her address through the PI Information screen in the Proposal Preparation function.)

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**User Permissions**

- ☐ Add, Modify, and Delete FastLane Users
- ☐ Change User Permissions
- ☐ Initialize/Change User Password
- ☐ Organizational Reports
- ☐ Administer Notifications To or Requests For NSF Approvals Under Grants
- ☐ Submit Proposals/Supplements/Updates/Withdrawals to NSF
- ☐ Administer Revised Budgets
- ☐ View/Print Organization's Award Letters
- ☐ View Project Reports
- ☐ Review/Revise Organizational Information
- ☐ Authorized Organizational Representative Functions
- ☒ **Financial Administrator**

6. Click the **Confirm Add User** button –NSF ID displays on notification.

**CONFIRMATION**

**Add User Data for - jack wilshire**

User has been successfully added to the FastLane system.

User Permissions have been successfully added.

User Financial Permissions have been successfully added.

Please note your NSF ID generated by the system is **000706199**

[Account Management Main](#)





## Modify a User Profile

1. Go to *Research.gov*, click on the **Research Administration** link at the bottom of the screen.
2. On the FastLane home page and click on **Research Administration**. The Research Administration home page displays with a listing of functions. Login using your last name, NSF ID number, and password.
3. On the **Research Administration** screen, click **Accounts Management**. The **Accounts Management** screen will display with the **User Account** tab as default.
4. Search for the User whose profile you need to modify.
5. On the **Accounts Management** screen, click **Modify** on the row for the user whose profile you want to modify.

The screenshot shows the 'Accounts Management' interface with the 'User Account' tab selected. The organization is 'NSF'. A search bar contains 'Last Name: wilshere' and a 'Search' button. Below the search bar, a table displays search results. The table has columns for 'Name', 'Email Address', and 'Actions'. One user is found: 'wilshere, jack' with email 'jwil@gmail.com'. The 'Actions' column for this user contains links for 'View', 'Modify', and 'Delete'. The 'Modify' link is circled in red. Below the table, there is a 'Cancel' button.

Accounts Management | MAIN ▶ Organization: NSF

User Account Organization Information Financial Representative Information

[View Organization Permissions Report ▶](#)

**Search for existing User to view/modify data:**

Last Name:

**Search Results**

Click on User Name to view/modify/delete data. Sort results by clicking column title.

1 user found.

Name	Email Address	Actions
<a href="#">wilshere, jack</a>	jwil@gmail.com	<a href="#">View</a> <a href="#">Modify</a> <a href="#">Delete</a>

Export options: [Excel](#)

6. The **Modify User Profile** screen displays showing the individual's permissions.
7. In the **User Permissions** section, click the check mark box for Financial Administrator.
8. Click the **Modify User** button, and the **View Modify User Profile** screen will display.
9. Click the **Confirm Changes** button and the **Confirmation** screen will display.
10. Click **Account Management Main**, and the **Accounts Management Main** screen will again be displayed with the **User Account** tab as default.

The SPO Representative has now completed the required steps. The Financial Administrator must follow step two below to complete the financial setup.



## Assigning the Financial Function User Roles

The Financial Administrator gives permissions to one or more of your organization's authorized users to perform Financial Functions. The Financial Administrator is the only user who can assign permissions for Financial Functions to an individual in your organization. If the individual is not yet a user, have the SPO or another individual with Add, Modify, and Delete User permissions add the person as a user by completing the processes for **Add a New User** under Step 1 above.

To assign Financial Function permissions to an existing user:

1. Go to the Research.gov, click on **Research Administration**.
2. On the FastLane home page and click on **Research Administration**.
3. The Research Administration home page displays with a list of functions. Login using your NSF ID, last name and password.
4. Click on **Accounts Management**. The User Account tab screen displays as default.
5. On the User Account tab screen, search for the user you want to designate as a Financial Functions User (FFU).
  - a. On the **Accounts Management** screen on the **User Account** tab, click **Modify** on the row for the user you want to make an FFU. The **Modify User Profile** screen will display.
  - b. In the **Financial Permissions** section, click the check mark box for any number or all of the financial permissions shown in the screen below. Institutions should have at least one user with the following financial permissions:
    - ACM\$ Awardee Preparer
    - ACM\$ Awardee Certifier

Financial Permissions	
<input type="checkbox"/>	Financial Report Preparer
<input type="checkbox"/>	Financial Report Certifier
<input type="checkbox"/>	Cash Request
<input type="checkbox"/>	Cash Request History
<input type="checkbox"/>	Grantee EFT Certifier
<input type="checkbox"/>	Grantee EFT Preparer
<input type="checkbox"/>	Grantee EFT History
<input type="checkbox"/>	ACM\$ Awardee Financial Representative
<input type="checkbox"/>	ACM\$ Awardee Preparer
<input type="checkbox"/>	ACM\$ Awardee Certifier

A single user can act as the preparer and certifier simultaneously. *As mentioned, all permissions must be assigned by the Financial Administrator*



## Logging In to Research.gov

If you have been added as a new user and given financial permissions. You can now perform those financial functions for which you have permission.

1. Go to the **Research.gov** home page, click on “Submit or manage payment transactions.” The Research.gov Log-in screen appears.

Online grants management for the NSF community

Research.gov is the modernization of FastLane, providing the next generation of grant management capabilities for the NSF research community.

[More](#)

- Prepare & Submit Proposals**  
Prepare, submit and check status of proposals
  - Check Proposal Status
  - FASTLANE PROPOSAL FUNCTIONS**
  - Additional proposal functions
- Proposal/ Panel Review**  
Review proposals, participate in panels
  - FASTLANE PROPOSAL REVIEW**
  - Proposal Review
  - FASTLANE PANEL REVIEW**
  - Panelist Functions
- Awards & Reporting**  
Submit project reports, notifications & requests
  - Project Reports
  - Deposit Public Access Publication
  - Example Project Reports (Demo site)
  - Notifications & Requests
  - FASTLANE AWARD FUNCTIONS**
  - Additional award functions
- Fellowships & Honorary Awards**  
Nominate colleagues, apply for awards
  - Graduate Research Fellowship Program (GRFP)
  - Postdoctoral Fellowships and Other Programs
  - Honorary Awards

**Administration**  
Manage your account and user roles

- User Management
- FASTLANE ORGANIZATION MANAGEMENT**
- Research Administration

**Manage Financials**  
View balances and submit cash requests


- Submit or manage payment transactions
- More about ACM\$
- Program Income Reporting

**NSF Award Highlights**

- Explore Scholarly publications in the NSF Public Access Repository (NSF-PAR)
- With awards going back to 1994


2. Enter your last name, NSF ID Number, and password.
  - a. Click on **Log in**.
  - b. You will see your Research.gov **My Desktop** page.



**Research.gov**  
ONLINE GRANTS MANAGEMENT  
FOR THE NSF COMMUNITY

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 **NSF User Log In**

There are 2 ways to log in to Research.gov. Use your **NSF ID** or your **organization credentials**.

---

**NSF ID**

**Organization credentials** 

Last Name:

NSF ID:

 [Forgot my NSF ID](#)

Password:

 [Change / Reset my password](#)

or

Pick your organization:

If you don't see your organization listed -  
[Learn more](#) / [Register for InCommon](#)

[Log In for NSF Staff](#) [Log In for NSF Visitors](#)

- To access the ACM\$ click on the **Award Cash Management Service** link under Research.gov Services & Tools or the **Award Cash Management Service** link under your ACM\$ Dashboard.



**Research.gov** POWERING KNOWLEDGE AND INNOVATION

Home | Contact Us | Site Map | Help | My Profile | Logout | January 24, 2013

**MY DESKTOP**

Research.gov Services & Tools

- Find Reviewers
- Research Spending & Results
- Policy Library
- NSF Staff RSS Feeds
- Award Cash Management Service

Research.gov Labs

- About Labs
- Proposal Compliance Review
- Conflict Screening
- Proposal Search
- Document Search
- Award Manager

NSF Services

- eJacket
- PIMS
- Inside FastLane

What We Do

- What is Research.gov?
- NSF Staff Services
- News
- SEE Innovation

FEEDBACK

- Tell Us What You Think

**Find Reviewers**

Alerts

Award Manager, Panel Reporting and HRM Reporting Utility may be intermittently unavailable.

Research.gov will be undergoing maintenance January 24, 7:00 to 9:00 PM Eastern Standard Time (EST). Users will not be able to modify preferences or register a Visitor account during this time.

For additional assistance, contact IT Help Central - 7 AM to 7 PM EST, Monday through Friday at 703.292.HELP (4357), toll free at 800.711.8084 or by emailing [ithelpcentral@nsf.gov](mailto:ithelpcentral@nsf.gov).

**My Desktop**

Explore the new NSF Research.gov Desktop, an intuitive and flexible online workspace for NSF staff. The first new tools to be offered on the Desktop, Find Reviewers and What We Do, help to illustrate the kinds of exciting tools and services for staff that are possible through Research.gov. Try out the Desktop today and tell us what you think! NSF needs your feedback and input to help shape this workspace and the new tools that it offers.

The ultimate goal for the Desktop is to provide staff with an integrated location where they can access the resources needed to support their program work – a seamless experience for completing a variety of mission functions! The Desktop will provide easy, centralized access to the services, tools, and grants management information you need, including:

- Existing information (such as Principal Investigator and Reviewer data) provided in a single view, which can be utilized in dynamic ways previously not possible
- New information that was previously hard to find or inaccessible
- Brand-new tools and services, as well as existing business applications
- Instructional materials and job aids

Desktop Services Available:

**Find Reviewers** showcases the possibilities that exist in this environment for dynamic new tools and services and increased access to important information. Find Reviewers helps staff find and identify qualified reviewers by marrying information from a variety of sources to provide a comprehensive view of potential reviewers. Information available includes:

**My Links**

**Project Reports**

Learn about the [transition of project reporting](#) from FastLane to Research.gov.

**Events**

January 28 - 29, 2013  
[FDP General Meeting](#)  
Conference

March 8, 2013  
[Webinar: Project Reports on Research.gov: What's in it for Me?](#)  
Outreach

## How to Change the Banking (EFT) Information

NSF disburses funds to your organization's bank account on the basis of the banking information you have submitted to the System for Award Management SAM. Before you can request a payment transaction you insure your SAM registration, to include the banking information is active and up to date. The SAM user guide is at:

[https://www.sam.gov/sam/SAM\\_Guide/SAM\\_User\\_Guide.htm](https://www.sam.gov/sam/SAM_Guide/SAM_User_Guide.htm)



## **Award Cash Management \$ervice**

ACM\$ is the financial service for award payments that requires the submission of award level payment amounts each time funds are requested. ACM\$ is accessed through [www.research.gov](http://www.research.gov). ACM\$ allows grantee institutions to submit cash requests and adjustments to open and closed awards, as well as access award level information on payments and award balances.

Use the links below to access ACM\$ user information.

[\*ACM\\$ Getting Started Guide\*](#)

[\*ACM\\$ Permissions Guide\*](#)